Sharpening Your Inquiry Skills

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We all know that communication is a critical component of a project manager's job. Up to 90% of a project manager's time is spent communicating and a significant portion of that time should be spent gathering information from others. One way to gather information is through inquiry.

Most of the time we use an informal inquiry process, which is what happens over the course of a conversation when we ask questions. In conversations we typically switch back and forth between inquiry, asking questions, advocacy, and stating our ideas on a subject. "What do you think about the new PM methodology we're adopting?" (inquiry) "I think it's too complex." (advocacy)

Sometimes we need to use a more formal, structured process for gathering information from a person or from a group. An example would be when you are gathering customer requirements. Formal inquiry can also be used in conflict resolution, when you're trying to understand both sides of an issue. The Martin Training approach to formal inquiry is divided into four phases.

Phase 1. Preparation.

a. Prepare for the inquiry meeting. Define the outcomes you desire from the inquiry. What do you want to know? Prepare your inquiry questions. What questions will help your client provide you with the information you need? Next, determine how you will have the client analyze their responses. What tools will you use?
b. Choose a time and space. Choose a time and place that will minimize interruptions. Find a meeting room that will make the client feel comfortable and that provides enough wall space so that you can record the client's responses to the inquiry on banner paper. That will allow everyone to see what is being said. When you've finished your planning, send out the agenda.
c. At the meeting. Make sure all the participants have introduced themselves and then get consensus on the outcomes and the agenda. Review ground rules for the inquiry. Make modifications, as needed, based on group needs. Now you're ready to start.

Phase 2. Inquire. There are four steps in the inquire phase and you'll cycle through these as you move from one question to the next.

a. Pose the question.
b. Listen carefully to the response. Do you understand what the person means? Check your understanding by probing for clarification. Check your assumptions with the other person. Do not challenge or disagree with what the person is telling you. This is an inquiry, not an inquisition. Your purpose is to understand the other person's point of view, not to debate it.
c. Record the response. It's best to record on self-stick notes (using a marker) and slap these onto banner paper. You want everyone involved in the process to be able to see the response. Do not edit the person's comments. If what they said is too long to fit on a self-stick note, ask them how you might abbreviate what they said. Make sure, however, that you don't lose the client's meaning; notes that are too short are prone to misinterpretation.

Phase 3. Analysis. After you've gathered the client's responses, it's time to have THEM analyze them. In a requirements gathering process, you might ask the client to rate the requirements as 'must haves', 'highly desirables' and 'nice to haves'. You might ask them to rate the performance level required for each feature. You might have them rate each feature versus a competitive offering. (You may have your own analysis work to do on the results of the inquiry, such as defining resource requirements to provide the feature set, but do that after the inquiry process is over.)

Phase 4. Consensus. After the client has completed the analysis, it's time to summarize and check for consensus. The client's responses and analyses should be clearly visible on the wall, Review what has been covered and ask if this represents their thinking. If it doesn't, go back and revise until they feel you've fully represented their point of view.

As a project leader you are in the business of communicating. Formal inquiry is one of the skills that every project leader will have a need for at one time or another. Have you sharpened your inquiry skills lately?

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